

INTRODUCTION

Starting April 16th, In the Montera Mobile App you have full control of your Visa Debit and Credit Cards with the Card Management Widget. As a first step, download or update the Monterra CU Mobile App at the <u>App Store</u> or <u>Google Play</u>.

This step-by-step guide will walk you through the process of accessing card management features, updating alerts, and setting notifications.

CARD MANAGEMENT FEATURES

Within the Card Management widget, you will be able to:

- Place a temporary block on their card
- Set alerts and controls •
- Report lost/stolen cards and select replacement options
- Update pin
- Create and edit travel notices
- Add cards to Apple Pay or Google Wallet •

| Block this card Place a temporary block on your card. You can unblock your card at any time. |
|--|
| Alerts and Controls |
| Replacement Options |
| Update PIN |
| Travel Notices |
| Added To Apple Pay Open Card in Apple Pay. |

PROCESS

To access card management features beginning on April 16th :

- 1. Sign on to Monterra Mobile App
- 2. Click More
- 3. Select Manage Your Card
- 4. Click on Card Management from the drop-down menu





FEATURES

BLOCKING A CARD

 Within the Card Management widget, toggle the radio button to the right next "Block this card"



2. It will then ask if they are sure they want to block this card, click Block this card

| Are you sure you want to block this card? |
|---|
| Block your card to prevent it from being used for new purchases without closing your account. You can unblock your card at any time. |
| the second beaution |
| all and a second and |
| Block this card |

3. Once clicked, their Card Card status will show **Blocked** and the radio button next to "**Block this card**" will appear in **blue**





UNBLOCKING A CARD

4. Toggle the radio button to the left next to "**Block this card**." Once switched the radio button will appear in grey O as it was in the beginning.

| Block this car Place a tempora unblock your car | d ry block on your card. You can rd at any time. | |
|---|---|--|
| ALERTS AND CONTROLS | | |
| To create card alerts: | | Alerts and Controls |
| Click Alerts and Controls Click Manage Card Alerts | Block this card Place a temporary block on your card. You can unblock your card at any time. Alerts and Controls | Visa Debit Card Card ending in 0801 Block this card Place a temporary block on your card. You can unblock your card at any time. My card settings |
| | | ▲ Manage Card Alerts ● Set the type of card alerts you want to receive. ● ▲ Manage Card Controls ● Block or enable specific card controls. ● |

3. Select Card Alert preferences such as locations, transaction limits and types, and Merchant Types.

| Manage Card Alerts | Transaction Types Set alerts for the types of transactions y notified about. | ou want to be | Merchant Types Set alerts for the types of merchants notified about. | you want to be |
|--|--|---------------|--|----------------|
| Card ending in 0801 | In-Store | | Department Stores | \bigcirc |
| Locations | Online | | Entertainment | |
| Set the alerts for your card so that you can receive alerts based on where transactions are authorized. | | | Gas Stations | \bigcirc |
| International | Auto pay | | Groceries | \bigcirc |
| Alert me every time this card makes an international transaction. | ATM | | Household | |
| Transaction Limits | Contactless | | Personal Care | \bigcirc |
| Set alerts to send whenever the transaction amount exceeds the limits you've set. | Purchase Return | | Restaurants | |
| Per Transaction | Original Credit Transaction | | Adult Entertainment | \bigcirc |
| Alert me when a transaction exceeds the set limit. | | | Airfare | |



4. Select Alert Delivery Method preference (includes Email, SMS Text, and Push) and then click Save.

| Alerts and Controls | < |
|---|------------------------------------|
| Alert Delivery Method | ¢ |
| By registering this card you agree to receive communications about your card to the channel selected below. This may include basic card status information as well as any notifications related to other controls you select in the future. | By i con sele info oth |
| Select between available SMS-verified phones numbers and available email addresses | Sele |
| Email Select email for alert delivery. | |
| SMS Text Select phone number for alert delivery. | ~ |
| 562-760-8225 | |
| Push Select a device for alert delivery. | |
| Save | |
| Cancel | $\left(\right)$ |

REPLACEMENT OPTIONS

To report lost or stolen cards select replacement options:

| Alerts and Controls | |
|---------------------|--|
| Replacement Options | |

- 1. Click Replacement Options
- 2. Click the drop down list and select the applicable reason: Lost, Stolen, or Damaged
- 3. Once selected, click Continue to be taken to the Next Steps.

| Replace Card | Replace Card | K Manage Your Cards |
|---|-------------------------------------|--|
| Card Description Vice Debit Card Card Description Card Description Card Description Card Description Card Description Card Description Card Description | Card Description Visa Pebli Card | C Replace Card |
| Reason Damaged | Reason v | Card Description Card Number Visa Debit Card 0801 |
| address. You may contact your financial institution to change your address. | | Reason |
| Cancel | Cancel | Stolen My card was stolen |
| | Continue | Damaged My card is damaged |



4. The next steps will vary depending on the selected reason.

- a. Lost or Stolen
- b. Damaged



UPDATING A PIN

To update a PIN:

| Replacement Options | |
|---------------------|----|
| Update PIN | וכ |

- 1. Click Update PIN
- 2. Enter New Pin
- 3. Confirm New Pin
- 4. Enter Current Pin once more
- 5. Click Update Pin





TRAVEL NOTICES

To create travel notices:

1. Click Travel Notices

| Update PIN | |
|----------------|--|
| Travel Notices | |

- 2. Enter Start Date and End Date
- 3. Enter Destination and Add Destination
- 4. Click Save.
- Once saved, a message will appear to confirm the Travel Notice has been succesfully submitted and wil have the option to add additional travel notices.

| Travel Notices | Travel Notices |
|--|--|
| While traveling, provide us with your plans to prevent potential card interruptions | While traveling, provide us with your plans to prevent potential card interruptions |
| Start Date 10-17-2024 | California Oct 17, 2024 - Oct 18, 2024 |
| End Date 10-18-2024 | |
| Destination V | |
| State California | Add New Travel Notice |
| Add Destination | |
| | |
| (Cancel) Save | Travel Notice has successfully been x submitted. |

PUSH PROVISIONING FOR iOS

| 1 | Click | Add to Apple Walle |
|---|-------|--------------------|
| _ | | |

A message will pop up to ask to add this card to
 Apple Wallet, click

| 8 | Debit Card | |
|----------------------|---|---|
| Ad | d this card to | Apple Wallet? |
| Onc Wall onlir | e added, you can u et to conveniently ne. | use this card in Apple pay in store, in apps and |
| 1 | | to Apple Wallet |
| | | |

- 3. Once selected, verify the card information by entering the billing address and click Verify.
- 4. A pop up will appear to mention that they are going to connect with Apple Wallet,

| Verify Your Card | d Information |
|---------------------------------------|------------------------------|
| Please verify your ca information: | rd by entering the following |
| Billing Address | |
| Billing Address 2 | |
| City | |
| State | ✓ Zip Code |
| | Verify |

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not operated by Monterra Credit Union,

click Yes



- 5. Select the desired device to add Apple Pay
- Once selected, the card number will be truncated with the last 4 digits displaying only, click Next.

| Add Card to Apple Pay | K Back Next |
|---|---|
| Your Card can be added to iPhone or Apple Watch. | Add Card Your Card will be available in Wallet on "iPhone." Card Number |
| iPhone (300) | |
| Theresa's Apple Watch | |

- 7. Review the Terms and Conditions and click Agree.
- Once Agreed, members will have the option to Use as Default Card or Not Now





Terms and Conditions For Adding Your Monterra Credit Union Credit or Debit Card to Mobile Wallet Service

These terms and Conclusions (the Turning Legan venery our process is and a Materian Credit Union credit card in Amazon Credit Union Conclusions and the Conclusion of the Concentration Credit Union of the Concentration of the Montener Credit Union Card, and we the Concentration of the Concentration of the Concentration of the Amazon and the protection of the Concentration of the Concentration Credit From Card, By selections in the check for the first hard read, and a set of the Concentration of the Concentra

- 9. Once a selection has been made a message will appear to confirm the card has been successfully added to the Apple Wallet.
- 10. Click **Done** and a message will appear that the card was **Added to Apple Pay**







PUSH PROVISIONING FOR ANDROID



2. Once selected, click Continue when asked to add this card to Google Pay.

- 3. Verify the card information by entering the billing address and click Verify.
- A pop up will appear to mention that they are going to connect with Google Pay, not operated by Monterra Credit Union, click Continue



| Verify Your (| Card Information |
|-----------------------------------|----------------------------------|
| Please verify you information: | r card by entering the following |
| Billing Address | |
| Billing Address 2 | |
| City | |
| State | ∠ Zip Code |
| | Verify |
| | |

Business Debit Card

Add this card to Google Pay? Once added, you can use this card in Google Pay to conveniently pay in store, in apps and online.

Continue

5. Click Add to Wallet and review the Issuer terms, then click Accept.





6. After the Terms have been accepted, click View in Wallet and the card will now be available for use in Google Wallet.



- a. Once the Card Management widget has been closed a pop will appear to ask to Set as default or Cancel Set as default in
- b. After a selection has been made it will show the card has been sucessfully added to Google pay and now they can view the card in Google Wallet.





Google Pay?

Cancel

in stores

Visa •••• 2632 will be charged whenever you pay with Google Pay

Set as default